

## **Planning for Information and Assistance (I&A) Service**

*The core service of an Aging and Disability Resource Center (ADRC) is Information and Assistance (I&A). Approximately 80% of all contacts made to ADRCs do not result in a referral for government programs and services, and do not involve the traditional intake process.*

### **ADRC Information and Assistance**

Information and Assistance is a professional service provided by ADRCs to the public. I&A ranges from sharing information and responding to requests, to in-depth conversations that take place over time regarding an individual's concerns and challenges. The I&A Specialist provides knowledge and research into all available options, and decision support when the individual chooses his or her next steps. I&A is a time intensive process. People may not know to ask for a specific service by name, so it is important that I&A specialists have the time to establish a personal rapport, understand all of each person's concerns, and be able to offer all potential resources and solutions. I&A service also includes following-up with people to find out how well proposed solutions worked for them, and if they need any additional information or service.

The public needs to be made aware that the ADRC is the place to go to get information and help with a variety of questions and concerns of importance to adults with disabilities, elders and their families. Agencies such as health care providers and social service providers can use the ADRC to find help for their clients. Even information and referral providers - such as 211 and crisis lines - will want to refer people to the local ADRC to get in-depth information about how to decide between programs and services, including determining eligibility and support for choice and decision making in long-term care. Written memorandums of understanding can be a vehicle to articulate referral protocols between agencies and clarify differences among the I&A services provided by each agency.

### **The Relationship between I&A and Long-Term Care Options Counseling**

Long-term care options counseling is an extension of the I&A process. This service is focused on consumer education and is often provided when an individual is planning for or currently experiencing a life change. These life changes may include surviving a traumatic event such as a car accident, a medical event such as a stroke, or the transition from school-based services to programs for adults with disabilities. To be effective in providing this service, it is important to take the time needed to fully understand each individual's strengths as well as needs. In order to ensure continuity in service delivery, options counseling can be provided by the same I&A Specialist that began the process with the individual.

### **Relationship with the Public**

All people should have access to trained Information and Assistance professionals. Contacts from the public come in all forms, including phone calls, letters, e-mails, and in person. Walk-in contacts must have a place to talk with I&A Specialists confidentially to allow for disclosure of personal financial information or intimate details of a disabling condition. The ADRC must offer I&A services 8 hours per day, Monday through Friday, with continuous coverage between 11:00am and 2:00pm. Additional access to I&A specialists should be made available for occasional after-hours appointments when necessary.

### **Receptionist vs. I&A Specialists Initial Contact Models**

Each ADRC should have an established structure in place to best provide communication with the public. Important factors to consider include the volume of contacts and the number of I&A Specialists available to help. The following are two possible models for the initial public contacts.

Receptionist model- A staff position is dedicated to handling the initial contacts and routing them to the appropriate staff member, i.e. I&A Specialist, Disability Benefit Specialist, etc. This position would entail asking only the basic questions needed to determine the proper routing of the contact. The optimum service is a “warm” transfer to the appropriate person, not a voice mail or call back system.

I&A Specialist model- On a rotation basis, I&A Specialists answer all contacts and either handle them directly or refer them as appropriate.

### **Staff Requirements**

An ADRC must have at least one full-time Information and Assistance Specialist position. The I&A Specialist should not be expected to provide other services that are not part of the ADRC responsibilities. This staff position should not be considered synonymous with the agency’s “Intake” unit. This person must be certified by the National Alliance of Information and Referral Specialists (AIRS) within one year of the contract date or beginning of employment, whichever comes later. All staff members that answer the main phone line and other initial contacts must have thorough knowledge of the mission, operations, and referral policies of the ADRC.

### **Technical Systems**

Telephone System – The ADRC phone number must be toll-free and published in local phone books. The system must have the capacity to directly transfer calls, permitting staff to connect callers to emergency services and to other agencies or staff. The main phone line must be answered by a person, not a recording, during the ADRC’s normal hours of operation. The system must also have the capacity for callers to leave messages after hours.

Databases - Information regarding providers, programs, and services available in the ADRC service area (especially for private-payment) must be collected into a central database. For a minimal list of topics to be included please refer to the ADRC contract with the Department (Article II. B.) Building these resources is an on-going process. It is important to make sure that the resources included in the I&A database conform with Inclusion/Exclusion policies provided by the Department and data entries follow the established style guide. A client tracking database, using software such as Beacon, should also be considered in planning an ADRC with upcoming guidance from the Department.

Website – An ADRC must have a website that provides a description of I&A services and contact information for the general public as well as the ADRC’s target populations. Ideally, the website will eventually contain a user-friendly searchable resource database and be accessible to persons with disabilities.

### **Other Technical Assistance References**

For more information regarding I&A, you may refer to the following:

National Alliance of Information and Referral Systems (includes a listing of I&A Specialist certification requirements) - [www.airs.org](http://www.airs.org)

National Information and Referral Support Center- [www.nasua.org/informationandreferral](http://www.nasua.org/informationandreferral)

Website Accessibility for Persons with Disabilities – <http://www.usability.gov>

Family Care Quarterly Activity Reports –

<http://dhfs.wisconsin.gov/LTCare/ResearchReports/QrtActivityRpts.HTM>

Other considerations and resources for planning the Information and Assistance system of an ADRC are also available. Please send an email request to [RCteam@dhfs.state.wi.us](mailto:RCteam@dhfs.state.wi.us) or call Maurine Strickland, I&A Program Specialist, at (608)266-4448 for further information.